

GCC Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The GCC Foodservice Market size is estimated at 54.72 billion USD in 2024, and is expected to reach 98.04 billion USD by 2029, growing at a CAGR of 12.37% during the forecast period (2024-2029).

Higher dine-out frequency and increasing tourism contribute to the higher market share of the FSR segment

- The FSR segment accounted for the major share of the market in 2022, witnessing a hike of 77.79% in 2022 compared to 2020. Owing to the high dine-out frequency in the region, on an average basis, 40% of the population dine out frequently on a weekly basis, which has increased the sub-segment's growth over the past years. Due to increasing tourism and spending on food, the market is anticipated to grow rapidly.

- The cloud kitchens sub-segment is projected to witness the fastest growth, registering a CAGR of 15.86% during the forecast period, 2023-2029. Owing to the number of online delivery app users in the country, advancements in the delivery techniques like the use of heat bags, the 30-minute delivery time, special discounts, acceptance of digital payment, and contactless delivery have gained consumers' interest. In 2021, the fast delivery service Getir was the most popular food delivery app in the Middle East & African (EMEA) region, which was downloaded more than 23 million times in 2021. However, Uber Eats ranked second, with roughly 20 million downloads, followed by Deliveroo, with 13 million downloads in 2021.

- Demand for fast food is also increasing in the region. Owing to this, the QSR segment witnessed a significant growth of 61.40% in 2022 compared to 2020. Big chains like TGI Friday's, KFC, Burger King, and Pizza Hut are the most popular brands, which are expanding their footprint and accounting for the largest share of the market. The meat-based cuisine in both QSR and FSR segments accounted for the major share as the consumption of meat is high in the region, which was registered at 0.45 million metric tons in 2022 and is expected to increase further. Popular dishes include Shawarma, Al Harees, Kabja, Biryani, Chicken

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Curry, Kebab, and Fried Chicken products.

Saudi Arabia is the largest market owing to its sizeable population and higher disposable income

- Saudi Arabia is the largest country-wise segment in the GCC foodservice market, followed by the United Arab Emirates and Kuwait. The market is majorly led by the Middle Eastern full-service restaurant segment, which accounted for an estimated share of 24.92% in the Saudi Arabian market in 2022. People in Saudi Arabia appreciate regional cuisine cooked using locally produced goods. For lunch and dinner, dishes like roasted chicken, Kabsa, grilled meat, and fish specialties with rice are very popular.
- The UAE foodservice market has grown significantly in recent years in line with the rising number of restaurants and cafes. As of 2022, Dubai had more than 13,000 cafes and eateries, with an estimated 3.5 million population. The cafes & bars segment is expected to grow at a faster rate over the study period, registering a value CAGR of 2.71%. This has been attributed to the nation's rising cafe culture and the growing spending on specialty coffee. Over six million cups are drunk daily in the United Arab Emirates, which spends USD 630 million on coffee annually.
- In Kuwait, the cloud kitchen segment is the fastest-growing due to the increased penetration of internet users. The segment is estimated to record a value CAGR of 8.50% over the forecast period. As of 2022, nearly 4.31 million people in Kuwait used the internet, with the internet penetration rate rising to 99%. With the rising number of internet users, food delivery channels have increased and, in turn, boosted the sales of cloud kitchens. Talabat, Deliveroo, and Get Dukan are some of the prominent delivery players in the market. Thus, the Kuwaiti foodservice market observed a significant sales growth of 30% from 2020 to 2022. People are also looking for comfort food, which leads them to order food from home. Such factors are estimated to boost the sales of the foodservice market over the coming days.

GCC Foodservice Market Trends

Quick service restaurants in Qatar grow in popularity as the tourism industry booms

- Quick service restaurants in Qatar accounted for a share of 42% of the overall foodservice outlets in the country. Qatar received around 729,000 international arrivals in the first half of 2022, which is 19% higher compared to 2021 full-year visitors, which accounted for around 611,000. Qatar has been investing heavily in its tourism industry, which has increased the number of visitors to the country. Tourists often seek convenient and fast dining options, making QSRs a popular choice.
- Cloud kitchen outlets are anticipated to register the fastest growth in the market, with a CAGR of 6.20% by value during the forecast period. With the rise of food delivery apps and online ordering, consumers seek more convenient and faster ways to access their favorite foods. Cloud kitchens provide this convenience by delivering restaurant-quality food directly to customers' homes or offices. Food delivery players such as Talabat and Carriage held around 75% of the market share in 2022. Several players are entering the food delivery market. For instance, Deliveroo entered the Qatari market in 2022. The growth of online food delivery players is boosting the growth of cloud kitchen outlets in Qatar.
- The Qatari government has launched several initiatives to support small and medium-sized enterprises (SMEs), including cloud kitchens. For example, the Ministry of Commerce and Industry offers financial incentives to SMEs that meet certain criteria, such as being innovative and contributing to the country's economic development. Additionally, the government has streamlined the process for obtaining licenses to open new restaurants, making it easier for entrepreneurs to enter the market.

Average order value in Bahrain's full service restaurants was the highest in 2022, at USD 29.7, driven by popular dishes like

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jareesh, harees, machboos laham, mandi laham, and margoog

- In Bahrain, the average order was the highest among the FSRs in 2022 compared to other foodservice types, with a price of USD 29.7, which is around 54% higher than the quick service restaurants. Full service restaurants in the country have been making necessary changes to their menu offerings to attract more consumers by offering more expensive dishes with premium ingredients, leading to higher average order values. Some of the popular full service dishes in Bahrain are Jareesh (priced at around 6.5 USD per 300 g), Harees (priced at around 5.2 USD per 300 g), Machboos Laham (priced at around USD 7.4 per 300 g), Mandi Laham (priced at 7.4 USD per 300 g), and Margoog (priced at around USD 6.4 per 300 g).
- The average orders through cafes & bars in Bahrain increased by 11.24% between 2019 and 2022, attributed to increased coffee consumption. In Bahrain, the cafe culture has increased as people prefer drinking coffee in cafes, which is intrinsically linked to the demand for specialty coffee in the region. Thus, this trend drives the growth of the coffee market in the country. More upmarket and expensive menu items are also being increasingly offered in cafes, such as specialty coffee drinks, artisanal pastries, and gourmet sandwiches, increasing the average order value in cafes.
- The average order value for the cloud kitchen was priced at 13.4 in 2022. The expansion of the cloud kitchen industry is being driven by an increase in the demand for online meal delivery. Popular dishes offered by cloud kitchens in Bahrain are Harees, Kebabs, Hummus, and Fatayer, priced at USD 5.2, USD 2.8, USD 5.8, and USD 1.7 per 300 g in 2022.

GCC Foodservice Industry Overview

The GCC Foodservice Market is fragmented, with the top five companies occupying 1%. The major players in this market are ALBAIK Food Systems Company SA, Americana Restaurants International PLC, Kudu Company For Food And Catering, LuLu Group International and MH Alshaya Co. WLL (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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